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ABSTRACT

Making changes in the area of grouping for instruction is difficult because it involves adjustments in the curriculum, in teacher planning, and in teacher attitudes. A concern that the present form of grouping may result in intellectual and racial discrimination began in the Central Office and the Curriculum Office of the Crete-Monee School District (Illinois). The issue was referred for study to the Program Council, and after having gathered and discussed grouping research, a fragile consensus was reached that change was needed; however, the advocates of change were afraid that the problem would require too drastic an alteration. The solution was to bring in an experienced consultant, who alleviated their anxiety by advising them and giving a fresh interpretation of the data. Although the Program Council rejected the guidelines first proposed, it gradually evidenced interest in making a change as new measures to increase the members' input and to ensure consensus began to take effect. As this case study suggests, experimentation, flexibility, long-term perspective, and mutual input and communication are organizational traits that affect the extent and thoroughness of a school district's acceptance of the consultant's qualities, such as interest and experience, district knowledge, and problem recognition. Dramatic changes in attitude, approach or focus, and behavior could be observed among members of the Program Council. Attached are a list of references, two tables, and one figure. (RG)

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Organizational Factors Affecting Curriculum Change: A Case Study of Instructional Grouping Innovations

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ORGANIZATIONAL FACTORS AFFECTING CURRICULUM CHANGE: A CASE STUDY OF INSTRUCTIONAL GROUPING INNOVATIONS

In the fall of 1985 the Crete-Monee School District began an in-depth study of the instructional grouping literature in order to create board policy and administrative procedures for using instructional groups in district schools (K-12). In this paper a case study approach is used to explore the evolution of the problem, the attempt to change attitudes, and the implementation of new grouping strategies. The roles played by district personnel and an external consultant are explored to suggest effective ways to facilitate change through collaboration.

CHANGE IN ORGANIZATIONS

Schools, like other social systems, rarely operate rationally. Concern for internal maintenance of the system, cultural patterns, or environmental pressures may take precedence over goal attainment (Parsons, 1959). Because schools as ongoing organizations respond to values more often than to goals, attempts to effect change must take into account belief systems (Sergiovanni, 1986; Block, 1985; Sarason, 1971; Sarason & Klaber, 1985).

Certain factors make innovations more likely to be accepted and incorporated into the belief system of an organization:

1. Teachers are the source of change (Rutherford & Murphy, 1985).

2. Change is optional; participation is voluntary (Rutherford & Murphy, 1985; Helms, 1985).

3. Required changes are minor (Rutherford & Murphy, 1985).

4. Teachers have flexibility to use judgment and to be in charge of their own change (Sirotnik, Goldenberg & Oakes, 1986; Rutherford & Murphy, 1985).

5. Change involves curriculum, schedule, or student behavior, as opposed to teacher behavior or practice (Rutherford & Murphy, 1985).

6. Change begins on a small scale (Block, 1985).

7. Change focuses on prevention, not remediation (Block, 1985).

8. Persons in charge understand the culture of the organization and the complexity of change, and can diffuse anxiety over change (Sarason, 1971; Sarason & Klaber, 1985).

9. Cross-hierarchical communication is possible, such as teacher-teacher, or administrator-administrator (Helms, 1985).

10. Change focuses on variables that are alterable (Block, 1985).

Kenney & Roberts (1986) proposed a model for organizing these factors: (a) characteristics of the innovation; (b) characteristics of the planning and implementation process; (c) characteristics of the internal educational organization; (d) major external characteristics. This model will be used to describe the case study features which affected the innovation process in instructional grouping.

CASE STUDY CHARACTERISTICS

The Innovation Itself

Grouping for instruction has characteristics which make it a difficult area in which to effect change. Some of these characteristics are generic to the topic; others were inherent in the local approach. First, changes in grouping strategies require major adjustments in scheduling, curriculum, teacher planning, teacher instructional behavior, and teacher attitude and expectations. Second, teachers tend to hold strong preferences for grouping students by ability or achievement. Third, in this particular case study, the idea was generated from central office, rather than from teachers.

The problem of instructional grouping is not unique, however. An assumption of this paper is that instructional grouping is generalizable to all problems which are: (a) value laden (predisposed to entrenched biases); (b) identified first at the top of the organization, but requiring "bottom-up" buy-in for change to occur; (c) inherently unclear and complex, both in their definitions and in their solutions.

Since grouping for instruction has characteristics which inherently mitigate against the successful introduction of change, the other three characteristics of the model become particularly important in predicting success. Each of these other characteristics will be explored in the paper with examples from the case study.

Planning and Implementation Process

The sequence of steps involved in the case study (to date) are shown in Table 1. The timeline is semester based, showing the involvement of various organizational levels and particular roles over time. Table 2 shows the belief systems (conflicting values and underlying agendas) of six different levels of the

organization with regard to instructional grouping. There were several critical points in the change process, including consultant/district interactions. These are presented below and shown in an event-state format (Miles & Huberman, 1984) in Figure 1. Circles represent general states which serve as links between events (rectangles).

Concern Emerges

The concern about instructional grouping originated in Central Office. The Superintendent was convinced that the district did too much secondary school tracking in which students were relegated to low levels of success and achievement or to inflated and elitist self-images. At the same time the Assistant Superintendent for Curriculum and the Director of Evaluation and Curriculum had similar reservations about the current grouping situation, not only at the secondary but also at the elementary level. Their concerns were that current grouping practices increased racial segregation and led to a less enriched program for lower level students. In addition, lack of a consistent policy led to unjustifiable differences among buildings.

The Assistant Superintendent for Curriculum and Director of Evaluation and Curriculum (together referred to as the Curriculum Office) formed the internal core of change agents. They served as the "idea champions" (Williams & Bank, 1982) who were committed to improving instructional grouping strategies used in the district.

The Superintendent referred the issue of instructional grouping to the Curriculum Office and requested that policy and administrative guidelines be developed to address the question in District 201-U schools. The Curriculum Office then referred the issue for study and recommendation to the Program Council. This body, composed of teachers and administrators from all levels, is the recommending body for all issues on curriculum and instruction which transcend individual grades, schools, and subject matter. Program Council was asked to study the issues and come up with policy and procedural recommendations by the end of the 1985/86 school year.

Grouping Research Read & Discussed

Significant research from a variety of perspectives (most in summary form) was gathered by the Director of Evaluation and Curriculum and discussed during the fall of 1985. The monthly discussions at Program Council surfaced very deep personal biases about the topic of grouping which influenced the reading of the research. Past history, fear of parental pressure, and concern about teacher reaction drove administrative opinion. Teachers were divided, with some supporting the research (mostly out of equity concerns) and others questioning its validity.

The weight of research evidence and implications for grouping in the district philosophy (that all children can learn) eventually led to a fragile consensus within Program Council. Members began to talk tentatively about what change was needed and how change could happen. There emerged a cautious optimism that we could make some adjustments that would mitigate the disadvantages of typical grouping strategies.

Roadblock Number 1: Where Do We Go From Here?

By the end of the fall semester 1985, Program Council had reached a roadblock. There was frustration that the problem seemed too overwhelming to address without changing an entire social system (new curriculum, massive inservice, and attitude changes). People expressed concern that we might "throw out the baby with the bath water", a euphemism for losing the district's popular honors programs.

Identify Appropriate Consultant

The need for a consultant was recognized in the Curriculum Office, and the search began for someone with a background in the social organization of schools, with some experience in grouping, who could propose options to the current system and suggest how change could be made. The Curriculum Office bias was for change from the bottom up, and a consultant was sought who shared this philosophy.

Direction Provided by Consultant

The consultant, after prior discussions and exchange of information with the Curriculum Office, met with Program Council once in February 1986, later that semester with the Curriculum Office, and one final time in June with the Director of Evaluation and Curriculum. Details of that collaborative relationship are discussed in a companion paper (Barr, 1987). She performed four critical functions in the change process:

1. Provided a theoretical perspective for understanding schools, grouping, and change.

2. Interpreted district data in a new way for us, within this framework.

3. Suggested that guidelines be developed to allow flexibility and local control in creating instructional groups and that volunteer teachers and administrators be solicited to pilot some alternative practices.

4. Provided regular review, critique, and suggestions by phone at critical junctures.

Roadblock Number 2: Rejection of Grouping Guidelines

After input from the consultant (mid-spring 1986), the Curriculum Office wrote a draft of guidelines based on the initial consultant input with Program Council plus the follow-up meeting with the Curriculum Office alone. This draft received very negative reaction from Program Council because they lacked substantive input into its development and felt no buy-in to the document. In addition, the content of the document was partly based on additional conversations with the consultant, to which Program Council members had not been privy.

Program Council Consensus Emerges

The Curriculum Office and consultant together planned a new approach, in which the draft of guidelines was discarded and replaced with a values clarification exercise. At a day long meeting Program Council generated a set of assumptions or values with regard to grouping and a plan to share these values with the staff. Immediate plans for procedural guidelines were postponed until teachers had a chance to review and discuss the assumptions on which these guidelines would be based.

Interest Emerges

Over the last year and a half, within Program Council, evidence of personal commitment to common values about grouping has emerged. Principals and teachers on Program Council both expressed interest in reducing the number of track levels, improving the placement of students in them, and enriching the curriculum delivered to students in the lower achievement classes. The Curriculum Office supported all these efforts with approval, help in planning, and inservice/materials money.

For example, the junior high principal, who had been a strong proponent of tracking at the secondary level, began to encourage his teachers to consider placing students where they would be challenged. He arranged a number of moves at the semester to accommodate students who had been encouraged to higher levels of achievement in math. This principal also reviewed test data on students prior to registration and announced that at one of his grade levels the basic level class would no longer be needed because "We don't have enough students functioning at this level and can incorporate those few at the regular level."

Two teachers at the other junior high school, one on Program Council, requested elimination of one level in math and one in science because there was simply too little difference among the students normally assigned to those levels. In addition, these teachers were given extra training in the Bernice McCarthy 4-MAT model, as a supportive device to provide instruction to less abstract learners.

At the high school level, a teacher on Program Council submitted a request for curriculum modification in order to move a basic level class into the regular curriculum for second semester.

The intermediate teacher on Program Council became interested in cooperative learning strategies as an alternative grouping arrangement in heterogeneous classes. A quasi-experimental design (alternately assigning students either to her class or to a high or low homogeneous group) was put in place for the 1986/87 school year.

Outside Program Council some interest was also evident. While Program Council was studying grouping, teachers at one elementary school were quite concerned about the grouping study and requested a meeting with the Director of Evaluation and Curriculum. This discussion was not only informative for the teachers, but left them with a feeling that much of what they were currently doing was positive. During the spring semester (1987) teachers at one grade level in this school began to experiment with team teaching and unit grouping of students. A junior high language arts teacher, after the inservice on values, requested assistance in enriching the basic level curriculum with higher order thinking and reading skills. One junior high math department has responded positively to reducing the number of seventh and eighth grade math levels from five to three with some concommitant curriculum changes.

Not all interest was positive, however. Early in the process, concern emerged from the teachers association officers that reduction of the number of levels would lead to larger class size. Program Council and the Curriculum Office responded to these concerns both formally (letter) and informally (phone conversations). In addition, the high school language arts department reacted negatively to the proposal from one teacher to use the regular curriculum with one basic level section, although this reaction was largely the result of a lack of information and communication.

Sharing of Values for Discussion

The Director of Evaluation and Curriculum planned an inservice for teachers and training for administrators to deliver the inservice. Two Program Council administrators and the Assistant Superintendent for Curriculum were also involved in delivering the training to administrators. Staff were inserviced by the building principal in September. Some of these sessions were more thorough and better done than others, and these tended to generate more discussion and interest among the faculty. Some of the interest could not be accommodated since schedules were already set, but teachers were encouraged to think about feasible changes which could be piloted the next year.

Guideline Drafts

The first redrafting of a set of guidelines was based on the discussion of values at the Program Council meeting in May 1986. Many drafts were done between the summer of 1986 and the end of February 1987 when the final one was submitted for Program Council approval. All of these drafts subsequent to the values statement received input from a Program Council subcommittee. This input generated a buy-in from the Council that had been absent with the initial draft.

The most recent draft of guidelines has been submitted for staff discussion (by department in secondary schools and by grade level in elementary schools). These groups of teachers will meet several times to discuss implications of the guidelines for their current practice, and will submit written feedback to Program Council.

Future Plans

The guidelines submitted for teacher input during the spring of 1987 will be discussed and revised during the 1987/88 school year. Program Council will review the formal written input from teachers to generate revisions in the document, to design additional voluntary pilots, and to plan strategies for additional dialogue. In addition, Program Council will work with curriculum committees to assist them in incorporating guidelines in their curriculum development process.

1988-89 school year will see finalization and adoption of guidelines, development of a district board policy, and inservice of building administrators and teachers on their use.

Internal Educational Organization

A number of internal organizational characteristics emerged in this case study which affect how thoroughly and extensively a school district accepts change and which affect the impact of a consultant working within the district. (See Barr, 1987, for the consultant's view of relevant characteristics.)

1. A Linking Pin

Someone who serves as a "linking pin" (Likert, 1961) is available to serve as a liaison between the district and the consultant. This person needs to understand the inner workings of the district and potential roadblocks, and can define the problem and the goal. This person needs to relate directly (whether line or staff) to those in the organization who will develop and implement the change.

2. Long Term Perspective

District line administrators are willing to work for change over time and have a commitment to consultation overtime. Especially with controversial issues, time to achieve a buy-in and to modify belief systems is crucial.

3. Experimentation

The district is willing to experiment with different approaches in some schools and not others. If teachers are to be comfortable with new ideas, they must be able to try strategies tailored to their own style and situation, and not rubber-stamped for all.

4. Flexibility

The district is willing to set limits for behavior without dictating specific behaviors. By specifying conditions, the district allows a variety of strategies to be used, as long as these conditions are met.

5. Clarity of Purpose

The district can articulate a purpose and a desired outcome for consultation at the beginning of the consultant-district relationship. Although this purpose and outcome or the path to that outcome may change in the course of consultation, this clarity can give a necessary framework for district-consultant collaboration.

6. Consensus on Theoretical Perspective

The district is willing to accept the framework of the consultant, and "see the world" in the same way. In this case study the framework was sociological.

7. Communication and Mutual Input

A system of feedback loops is developed to cycle information and decision making processes between the consultant and the district. Both need a system for reacting to ideas. While communication and mutual input are critical, however, meetings are not. Materials can be exchanged and discussed by phone. The important component is that the consultant is kept up to date after each critical point, especially when decisions are made.

External Factors: Consultant

Consultant characteristics exist which affect the success of the consultative relationship, as measured by the success of implementing an innovation. (Other external factors, such as parent attitude, have not been dealt with in this case study except to recognize potential attitudes of these stakeholders.)

1. Interest and Experience

The consultant should have a long term interest and experience related to the problem. This experience will help the consultant identify relevant ideas, data, and resources.

2. Long Term Relationship

The consultant should be willing to establish an ongoing relationship with the district, be available on a regular basis for reactions, and establish a fee for service arrangement which facilitates an ongoing relationship.

3. Overt Theoretical Base

The consultant should be willing and able to state personal and professional biases at the outset of the relationship and to clarify that these biases will affect the perspective brought to issues.

4. District Knowledge Base

The consultant should expend time learning about the district, reviewing data and conversations prior to any substantive meeting. In addition, the consultant should be able to ask the right kind of questions to generate a sufficient knowledge base at appropriate points.

5. Group Process Skills

The consultant should appreciate and be sensitive to the biases that individuals, groups, and subgroups may bring to an issue. This skill includes being able to hear people and to explain research and theory so that lay people can understand. Clear written data to support propositions and or to illustrate points should be provided.

6. Problem Recognition

The consultant should be able to anticipate potential threats and roadblocks; that is, potentially upsetting conditions which may constrain the direction followed.

7. Alternative Directions

An effective consultant can see alternative paths needed to achieve the initial goal and can explain the requirements and consequences of each path. The consultant can identify why steps or ideas fail and how to best redirect efforts at these points.

CONCLUSION

The case study reveals a number of changes which occurred as innovations in instructional grouping were attempted. Each of these is discussed below.

Attitude Change

The most dramatic change of attitude occurred within Program Council, and especially among administrators. In two other schools, administrators became interested in the approach Program Council was taking and made some attitudinal changes along the same direction. Similarly some teachers at those two schools became interested in exploring alternative grouping strategies.

Redirection of Approach

Some major changes occurred in the direction which Program Council took to address this grouping issue. One shift was from a focus on district rules to a focus on shared values. Another shift was away from full-scale implementation to an incremental change model with teacher buy-in. The idea of generating flexible guidelines, which placed limits and conditions but did not dictate specific rules for grouping, became the new focus.

Behavior Change

As it became clear that Program Council was not planning rigid or rapid implementation of change, teachers and administrators became more interested in trying out some alternative grouping strategies for methods of assigning students to groups. Some of this was evident in the formal pilot projects which were planned in the spring of 1986. Others were evident in the use of values statement and school composition data by principals to make placement decisions at the building level.

Problems Yet To Be Solved

There are three problems which will need to be solved in order to continue to implement alternative grouping strategies, to finalize the guidelines, and to write a school board policy. First a system of monitoring needs to be established to determine that guidelines are in fact being followed at the building level, both by principals in assigning students to teachers and by teachers in constructing within- class groups. Secondly, the role of the principal (especially at the secondary level) vis-a-vis curriculum committees needs to be clarified. Third, as teachers "come on board" with some alternative grouping strategies, it will become necessary to offer training. Generating funds and interest in such inservice needs to be addressed, in a district whose top staff development priority is the Science of Teaching program.

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TABLE 1: INVOLVEMENT OF ORGANIZATIONAL LEVELS IN THE SEQUENCE OF ACTIVITIES

ORGANIZATIONAL LEVEL	SPRING 1985 PROBLEM RECOGNITION	FALL 1985 PROBLEM RESEARCH	SPRING 1986 VALUES CONSENSUS	SUMMER/FALL 1986 GUIDELINES PLANNING/ VALUES/DIALOG	SPRING 1987 GUIDELINE DIALOGUE
Central Office (CO) * Assistant Superintendent for Curriculum (ASC) * Director of Evaluation and Curriculum (DEC) * Superintendent (S)	SUP, ASC, DEC agree that instructional grouping has equity, quality, and cost considerations and should be studied.	SUP asks PC to develop policy and guidelines for instructional grouping. DEC provides readings and direction to PC in exploring problem and educating themselves about the issue.	ASC and DEC work with PC and consultant to develop options for policy and procedures. DEC works with PRIN and TCH to set up trials of grouping alternatives. ASC and DEC disseminate values statement to staff.	DEC works with PC subcommittees to draft guidelines. DEC, ASC, and PC administrators develop and deliver inservice to all district administrators. DEC provides consultative support for trials. ASC provides money and inservice time.	DEC works with PC subcommittee to draft guidelines. DEC develops feedback instrument for guidelines. ASC and DEC inservice CC on guidelines as a screen for curriculum development. ASC and DEC advise PRIN on sharing guidelines. DEC gathers data to evaluate trials with alternative grouping strategies.
Program Council (PC) * ASC * DEC * 3 PRIN * 4 TCH		PC studies research, debates issues, discusses options.	PC works with consultant (one meeting). PC rebels at ASC and DEC direction--backtracks and generates values statements.	PC subcommitte generates drafts of guidelines. PC discusses and revises guidelines each month. PC available to talk to buildings about values.	PC develops plan for dissemination of guidelines. PC available to talk to buildings about guidelines.
Curriculum Committees (CC)					CC receive copy of guidelines and inservice on using them.
Teachers (TCH) and Principals (PRIN)		PRIN give input on grouping. TCH and PRIN receive copies of PC minutes regarding grouping. TCH and PRIN volunteer to try out alternative grouping strategies.	PRIN give input on grouping. TCH and PRIN receive copies of PC minutes regarding grouping. TCH and PRIN volunteer to try out alternative	PRIN inservice TCH on values and research. TCH and PRIN implement trials.	TCH and PRIN receive copy of guidelines draft and feedback form. TCH submit feedback by grade levels (elementary) and by department (secondary).

TABLE 2: ADDRESSING BELIEF SYSTEMS AT DIFFERENT ORGANIZATIONAL LEVELS

level of involvement: high ↑ low ↓

SUBGROUP	INITIAL VIEW(S) OF GROUPING	PROBLEM(S) CREATED BY GROUPING STUDY	RESOLUTION/ CONSEQUENCE
Central Office Administrators	Concern for negative impact of homogeneous grouping -quality issues -equity issues -cost issues (scheduling)	Diversity of views within and among subgroups Need to achieve consensus on guidelines	Create atmosphere for dialogue -belief system (values statement) -emergent change (volunteers) -flexibility (guidelines) -input (drafts & dialogue)
Program Council	Diverse views- -curriculum office administrators & two teachers skeptical about homogeneous grouping -building administrators & two teachers supportive of homogeneous grouping of homogeneous grouping	Intense disagreement -within Program Council -between Program Council and Curriculum Office	May 19 values clarification session Involvement of subcommittees in drafting/ reacting to documents
Elementary Principals	-expect grouping within a class (all) -overtly opposed to homogeneous assignment to teachers (4/5) although most in fact use it occasionally -like current freedom to decide if, when, and how	Fear change -loss of autonomy -teacher reaction -parent reaction	Involve principals in delivering inservice Encourage them to consider alternative grouping plans
Secondary Administrators	-assert that criteria for grouping is domain of curriculum committees -believe that tracking helps students	Fear change -parent reaction -teacher reaction	Involve principals in delivering inservice Encourage them to consider alternative grouping plans
Teachers	-widely mixed views (elementary) -favor homogeneous grouping (secondary)	Fear of change - without support and training -with increase in class size -hope for minority students	Provide opportunity for dialogue -inservice on values -volunteers to try alternatives -feedback on guidelines -informal discussions
Parents	-honors classes (secondary) and homogeneous elementary classes favored by those involved -non-honors parents see homogeneous grouping as elitist (and racist)	-fear of losing high track -hope for more equity	Questions answered informally Avoid use of board meeting as forum

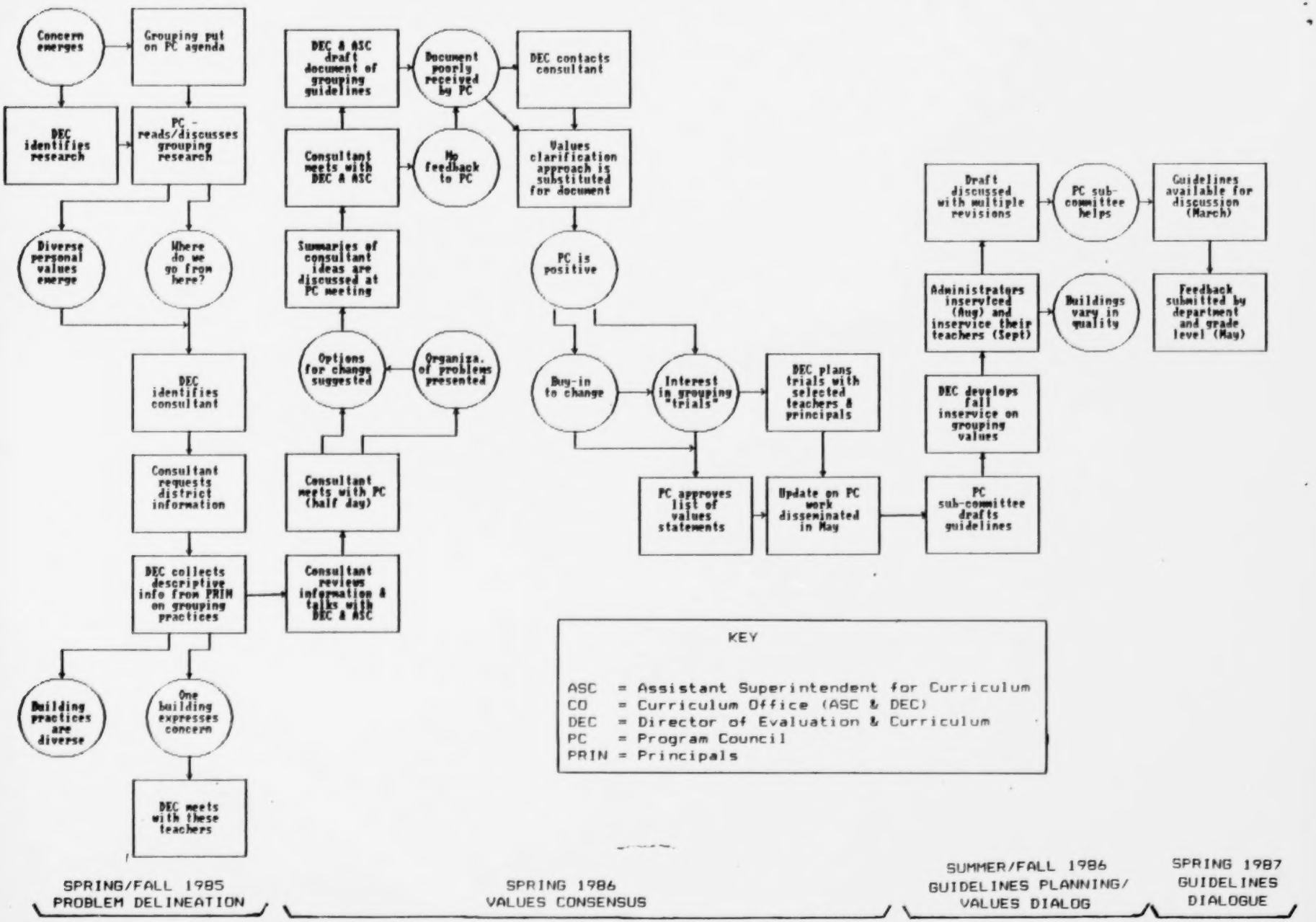
Concern emerges
Grouping put on PC agenda
DEC identifies research
PC - reads/discusses grouping research
Diverse personal values emerge
Where do we go from here?
DEC identifies consultant
Consultant requests district information
DEC collects descriptive info from PRIN on grouping practices
Building practices are diverse
One building expresses concern
DEC meets with these teachers
Consultant reviews information & talks with DEC & ASC
Consultant meets with PC (half day)
Options for change suggested
Organiza. of problems presented
Summaries of consultant ideas are discussed at PC meeting
Consultant meets with DEC & ASC
DEC & ASC draft document of grouping guidelines
No feedback to PC
Document poorly received by PC
DEC contacts consultant
Values clarification approach is substituted for document
PC is positive
Buy-in to change
Interest in grouping "trials"
DEC plans trials with selected teachers & principals
PC approves list of values statements
Update on PC work disseminated in May
PC sub-committee drafts guidelines
DEC develops fall inservice on grouping values
Administrators inserviced (Aug) and inservice their teachers (Sept)
Buildings vary in quality
Draft discussed with multiple revisions
PC sub-committee helps
Guidelines available for discussion (March)
Feedback submitted by department and grade level (May)
KEY
ASC = Assistant Superintendent for Curriculum
CO = Curriculum Office (ASC & DEC)
DEC = Director of Evaluation & Curriculum
PC = Program Council
PRIN = Principals
SPRING/FALL 1985 PROBLEM DELINEATION
SPRING 1986 VALUES CONSENSUS
SUMMER/FALL 1986 GUIDELINES PLANNING/ VALUES DIALOG
SPRING 1987 GUIDELINES DIALOGUE

FIGURE 1: SEQUENCE OF EVENTS (□) AND STATES (○)